COVER SHEET

ToMA as a Measure of Competitive Advantage for Short Break Holiday Destinations

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Pike, S. (2002). ToMA as a Measure of Competitive Advantage for Short Break Holiday Destinations. *The Journal of Tourism Studies.* 13(1): 9-19.

Abstract

One of the greatest challenges for destination marketers is positioning their multi-dimensional product in a crowded, heterogeneous and dynamic market place. Individual consumers will ultimately define the actual competitive position held by a destination. Since top of mind awareness (ToMA) has been associated with purchase preference, effective positioning that achieves ToMA may represent a source of competitive advantage for holiday destinations. This paper presents the results of an exploration of ToMA and purchase preference within the context of domestic short break holidays in New Zealand. The study found, for the sample in general (n = 763), there was little difference in the intent to visit five leading destinations for a short break. However, the likelihood of such a visit was significantly stronger for those respondents who identified that destination as their ToMA choice. Such information provides destination marketers with valuable benchmarks for tracking promotional effectiveness and therefore a measure of accountability for stakeholders.

Key words: Short breaks, top of mind awareness, decision sets, destination marketing organisations.

Introduction

If destination attractiveness is a function of the benefits sought by a traveller and the ability of a destination to provide them (Mayo and Jarvis, 1981), it would seem reasonable to expect that ‘attractive destinations’ would hold a competitive advantage over less appealing places. However, possessing attractive attributes does not necessarily provide any guarantee of success for destinations. Travellers are now spoilt by holiday destination choice. Recognition of the economic value of visitor spending has seen the establishment of thousands of destination marketing organisations (DMOs) worldwide. Travellers are increasingly bombarded with promotional messages from an almost limitless range of destinations. Differentiation has become difficult to achieve since travellers perceive an inherent sameness in many of the destinations available to them. Since any number of destinations can now ably provide the benefits sought by a particular group of travellers, destinations have become highly substitutable. Barney (1991, 1996) developed the VRIO model for determining the competitive status of an organisation’s resources. To achieve a sustained competitive advantage, the model recommended a resource must be ‘valuable’ to the firm for either increasing revenue or decreasing costs, relatively ‘rare’, costly for competitors to ‘imitate’, and the firm must be ‘organised’ in such a way that it is able to exploit the resource in the market. From this perspective it is suggested a destination’s ‘attractiveness’ may only represent competitive parity.

The challenge for DMOs is to ‘cut through’ the media clutter, of competing regions and substitute products, and obtain a differentiated position in the marketplace. Effective positioning can be a source of

competitive advantage (Porter, 1980), an assertion that also applies to the tourism industry (Kotler, Bowen and Makens, 1999). Positioning was first introduced to the advertising community as a marketing strategy in 1969 (Trout and Ries, 1979), and has been defined as a process “of establishing and maintaining a distinctive place in the market for an organisation and/or its individual product offerings” (Lovelock, 1991, p. 110). At the core of this quest for a distinctive place is recognition that marketing is a battle fought inside the consumer’s mind (Ries and Trout, 1986). Therefore it is consumers who ultimately define the actual position of a product.

How do travellers select a holiday destination from the almost limitless range of possibilities? The theory of consumer decision sets offers some explanation of this most complicated aspect of consumer behaviour. Howard (1963) and Howard and Sheth (1969) introduced the concept of the evoked decision set to propose the number of brands considered in any purchase decision was less than that actually available. The evoked set was defined as comprising only those brands the buyer will actually consider in the next purchase decision. Howard proposed the number of brands in an individual’s evoked set would remain constant at about three or four. Woodside and Sherrell (1977) were the first to investigate evoked sets of destinations in the holiday decision process. They were motivated by the proposition that the mental processes required to evaluate the features of 15 or more destinations would represent too great a task for most travellers.

Decision sets are formed by a combination of external information sources such as prior experience, general knowledge, advertisements and feedback from friends, as well as internal factors such as needs, motivation

and evaluative criteria (Spiggle and Sewall, 1987). The reduced set of likely alternatives that form the evoked set is part of the total set. For travellers, this total set would consist of all those destinations that may or may not be available, and which they may or may not be aware of. How many destinations must there now be on the planet? Within this total set of destinations, Woodside and Sherrell (1977) proposed the following possible overlapping sub-sets:

- Unavailable and unaware set
- Awareness set
- Available set
- Evoked set
- Aware and unavailable set
- Available and unaware set
- Inert set
- Inept set
- Chosen destination

Clearly, a destination must firstly make it into the consumer's awareness set, which may represent a challenge for some destinations. Lilly (1984), for example, discussed the difficulties of promoting North Staffordshire, a region with little tourist image outside its own boundaries. It is important to recognise the distinction between this problem and that of a negative image, since a negative image denotes awareness. However, more than simply awareness is required. For example, Milman and Pizam (1995) found that awareness of a

popular USA domestic destination was not necessarily a strong indicator of intent to visit.

Crompton (1992) suggested that operationalising the awareness set in tourism would problematic, since the number of destinations a consumer is aware of will usually be far greater than consumer goods brands. Due to the number of possible brands in the awareness set, it is therefore more realistic for the marketer to determine the composition of the early consideration set. This set consists of those destinations the consumer believes could realistically be visited within a given time period. This represents the overlap of the awareness and available sets, of a limited number of destinations that an individual is likely to consider for their next holiday.

Miller (1956) cited a number of studies from the consumer psychology literature to suggest that the limit to the number of stimuli people could generally be capable of processing would be around seven. Miller even linked this proposition to the use of questionnaire rating scales, where seven points had generally been considered the limit of usefulness. The number seven may have implications for the length of such items as phone numbers, car registration plates and PIN numbers, as well as consumer decision sets. Also, Ries and Trout (1986, pp. 30-31) offered examples of the Seven Wonders of the World, Snow White and the seven dwarfs and seven-card stud. Woodside and Sherrell's (1977) literature review found this limit had generally been consistent in brand recall tests across product categories as diverse as cars and toothpaste.

When a consumer becomes involved in a purchase decision the early consideration set is categorised into three subsets: inert, inept and evoked

(Narayana and Markin, 1975). The inert set consists of brands the consumer has neither a positive nor a negative opinion. The consumer will have some awareness of the destination to stimulate initial interest, and therefore inclusion in the early consideration set, but may lack information to make a judgement. Or they may have sufficient information but see no advantage in pursuing it further at that point. The consumer is therefore undecided about visiting these destinations within a certain time period. In Woodside and Sherrell's (1977) study, the mean number of destinations in the inert set was .9. Other studies have found means of 1.8 (Thompson and Cooper, 1979) and 1.7 (Woodside and Lysonski, 1989).

The inept set consists of brands the consumer has rejected from the initial purchase consideration within some time period. Destinations in the inept set will have been rejected from the early consideration set due to negative perceptions, perhaps as a result of comments from significant others. Woodside and Sherrell (1977) found the mean number of destinations in the inept set was 1.4. Other researchers have found similar results, with means of 1.8 (Thompson and Cooper, 1979) and 1.6 (Woodside and Lysonski, 1989). Woodside, Ronkainen and Reid's (1977) four sample sub-groups generated mean inept sets of 1.8, 1.7, 2.3, and 2.1.

Once the inert and inept destinations have been eliminated from the early consideration set the remaining destinations form the evoked decision set. The evoked set comprises those destinations the consumer has some likelihood of visiting within a given time period (Woodside and Sherrell, 1977). In their study the evoked set size averaged 3.4 destinations for selection during the following twelve months. Woodside and Sherrell's results have

been supported in a number of other destination studies. For example, Bronner and de Hoog's (1985) study of Dutch tourists supported Woodside and Sherrell's proposition of four plus or minus two destinations in the evoked set. Thompson and Cooper (1979) found a mean evoked set size of 2.7. Other studies have found means of 3.3 and 3.8 (Um and Crompton, 1990), 4.2 (Woodside and Lysonski, 1989) and 3.1 (Ryan, 1994b). Woodside, Ronkainen and Reid's (1977) four sample sub-groups generated mean evoked sets of 3, 2.8, 1.5, and 1.1 destinations.

For consumer goods, it has been suggested that brands excluded from the evoked decision set may have a purchase probability of less than one per cent (Wilson, 1981). The concept of the evoked decision set therefore has important implications for DMOs if it is from this set that final destination selection will be made. It must be accepted that a hierarchy is developed within the evoked set of destinations, if a final selection is to be made. It has been proposed the higher the brand's position in a consumers mind, the higher the intent to purchase (Wilson, 1981). In this regard it has been shown that top of mind awareness (ToMA), measured by unaided recall, is related to purchase preference among competing brands (Axelrod 1968, Wilson 1981, Woodside and Wilson 1985). Consequently, for the destination that first comes to mind when a consumer is considering travel, ToMA must surely represent a source of advantage.

The travel context for this paper was narrowed to domestic short break holidays in New Zealand, which has received little previous attention by researchers. Short break holidays appear to lack an internationally recognised definition, although, in Europe, it has been suggested they are holidays of up

three nights (Euromonitor 1987, Fache 1994, Ryan 1983). For the purpose of the paper, a short break was defined as a non-business trip of one to three nights duration, away from the home environment. Auckland was the target market, which with approximately 1.2 million residents contains almost one third of New Zealand's population (Auckland Regional Council 1999).

Five 'attractive' destinations were of interest, for each of which Auckland represents the largest source of visitors. Bay of Islands, Coromandel, Mount Maunganui, Rotorua and Taupo are leading resort areas within a comfortable three to four hour drive of Auckland. Table 1 presents the number of nights spent by Aucklanders, in relation to the total domestic visitor nights, for the year ending June 2001. When interpreting this table, it is important to consider the nature of the Commercial Accommodation Monitor (CAM) data collection. Firstly, the CAM data does not measure nights spent in private accommodation such as with friends and relatives or at holiday homes. New Zealand holiday homes, locally referred to as bachs or cribs, are a popular form of accommodation. In the Coromandel, for example, there are an estimated 8,000 holiday homes (Jim Archibald, Tourism Coromandel CEO, personal communication, December 1999). Approximately one third of all Taupo homes were owned by absentee landlords, and were therefore either holiday homes or rental properties (Paul Yeo, Destination Lake Taupo marketing manager, personal communication, November 1999). Also, the CAM data does not provide any breakdown on issues such as such as reason for visit or motivation. Therefore the short break component was not able to be isolated from the total visitor nights, which include other travel contexts such as conference, business and summer holiday. It should also be noted

that Bay of Islands data is included in the Northland region. No data was available for Mount Maunganui. As can be seen in Table 1, Rotorua had the highest level of visitor nights in commercial accommodation by Aucklanders. The paper examines whether Rotorua's leadership position was related to ToMA and intent to visit, and therefore represent a measure of competitive advantage for the short term.

(INSERT TABLE 1 ABOUT HERE)

Method

The issues addressed in this paper were part of a wider study of the positioning of domestic short break destinations. A 165-item questionnaire was designed to feature two clearly distinct sections. Since this was the first examination of domestic short breaks in the Auckland market, the first section sought to explore some of the characteristics of this type of holiday, including: likelihood of taking a short break, the number of short breaks taken each year, maximum comfortable driving time, motivation, unaided ToMA destination, decision set composition, and the rating of the importance of 20 cognitive attributes. These attribute importance items were measured using a seven-point scale, anchored at 'Not important' (1) and 'Very important' (7). The attribute selection process included repertory grid interviews with Aucklanders, personal interviews with tourism decision makers in five regions and a review of 84 destination image papers published in the literature during the period 1973-2000. For a detailed account of this research stage the reader is referred to Pike (2002a). The questions in this section did not refer to any specific destinations, and respondents were advised to complete these before reading section two. An open-ended question was used to identify the

destination that was top of mind to the respondent, in the research context. Fishbein and Ajzen (1975) proposed that any exploration of the relationship between attitude and behaviour must include the following:

- The *behaviour*, which for this paper was a holiday.
- The *target object* at which the behaviour is directed. In this case, these were domestic destinations in New Zealand.
- The *situation* in which the behaviour is to be performed, which was self-drive short breaks.
- The *time* at which the behaviour is to be performed, which in this case was within the next twelve months.

The question was worded accordingly: *Of all the short break holiday destinations that would be available for you to visit in the next 12 months, if you were driving, which destination first comes to mind?* The next question asked respondents to list any other destinations they would probably consider when planning their next short break. The purpose was to identify the range of destinations that formed the evoked decision set. It was expected that the compact geography of New Zealand, the short break travel context, and the range of near-home destinations available within a short drive of Auckland would result in larger decision sets than those identified in previous studies.

The second section of the questionnaire sought the perceptions of the competitive set of five destinations. The two sections were clearly separated and respondents were reminded to complete section one before reading section two. Questions included destination performance ratings for the same

20 attributes used in the first section, two affect items, previous visitation and likelihood of visiting within the next 12 months. Intent to visit each destination was measured using a seven-point scale anchored at 'Definitely not' (1) and 'Definitely' (7). The cognitive attribute performance questions enabled importance-performance analyses, the results of which have been reported separately (see Pike, 2002b). Finally, the questionnaire concluded with a series of demographic questions, as well as space to provide any additional comments about short break holidays. As indicated, this paper has been limited to a discussion on the ToMA, decision set and intent to visit items.

Since the characteristics of those Auckland residents with a propensity for short breaks had not previously been identified, the questionnaire was mailed to a systematic random sample of 3000 Auckland households, selected from the 1999 Auckland telephone directory, during May 2000. Of the total number of Auckland households, approximately 323,379 (91 per cent) had a landline telephone connection (Auckland Regional Council, 1999). There were approximately 300,000 published residential listings in the directory, plus or minus three per cent (Sally Bazely, New Zealand Directories Ltd, Personal communication, September, 1999). This gave the sample frame coverage of 84 per cent of all homes, or 93 per cent of households with landline telephones. Every residential listing had a 1 per cent probability of selection. Names were selected by firstly generating a random starting listing, using the RAND formula in Microsoft Excel 97, and then selecting every 100th residential listing. The cover letter requested the questionnaire be completed by the person in the household, over the age of 18, who would next celebrate

their birthday. An incentive prize of a short break holiday at a mystery location was offered to respondents.

Results

A total of 763 usable questionnaires, as well as 56 non-usable responses were received. This represented a useable response of 26 per cent. Respondents' characteristics are presented in Table 2. A comparison of the sample characteristics with the 1996 Auckland Census data (Statistics New Zealand, 1997) indicated that respondents were generally older than the wider Auckland population, with higher education levels and residing in more affluent areas. It is suggested these characteristics were representative of those residents with the inclination for short breaks. Respondents indicated a strong intent towards taking a domestic short break holiday, by car, during the following twelve months. On this seven-point scale, where 7 represented the highest score, the mean was 5.8, and the standard deviation was 1.4. Only 73 respondents (9.7 per cent) scored this item below the scale mid-point. The mean number of short breaks per year per respondent was four, with 640 respondents (85.2 per cent) indicating two or more such holidays per year.

(INSERT TABLE 2 ABOUT HERE)

The grand mean for the 20 cognitive attribute importance items was 4.38. Eleven attributes were considered determinant for the sample, with means about the same as, or higher than the grand mean. The attribute importance scores are shown in Table 3, where it can be seen that the two highest rating attributes were 'suitable accommodation' and 'good value for money'. The Cronbach alpha for the 20 attribute-importance scales was .83. The Kaiser-

Meyer-Olkin (KMO) score for the attribute importance scales was .83. Kaiser would have regarded this as ‘meritorious’, and therefore suitable for conducting a factor analysis (George and Mallery, 2000).

Since factor analysis is a procedure for exploring data (Ryan 1995), a number of exploratory analyses were trialled, by removing attributes and using orthogonal and oblique rotation techniques, following Parasuraman, Zeithaml and Berry (1988). In searching for a simple structure (see Kline 1994, pp. 64-67), where factors have a few high loadings, the cleanest rotated component matrix was generated from a factor analysis using 16 attributes. Four attributes, ‘Maori culture experiences’, ‘Snow sports’, ‘Within a comfortable drive’ and ‘Wineries’, were not included due to low correlations with other attributes. All other attributes were correlated with between two and six attributes at greater than .30. The KMO score for this analysis was .81, and the combined alpha for the 16 items was .82. Principal components analysis with a varimax rotation was used and only factors with eigenvalues greater than 1 were accepted. A four-factor solution was generated, which explained 55.2 per cent of total variance. The results of this factor analysis are presented in Table 4. Each factor featured a minimum of three attributes, as recommended by Kline (1994).

(INSERT TABLE 3 ABOUT HERE)

(INSERT TABLE 4 ABOUT HERE)

The results of the unaided ToMA question, presented in Table 5, indicated a particularly strong position held by Rotorua. This destination was selected by almost one quarter of respondents, which was three times the

number for the fifth ranked destination, Mount Maunganui. The top five destinations elicited accounted for 545 respondents (73 per cent).

(INSERT TABLE 5 ABOUT HERE)

The mean number of destinations in respondents' evoked decision sets was 3.9. This result was consistent with Howard's (1963) proposition that the evoked set would be three to four brands, and Woodside and Sherrell's (1977) suggestion that in the holiday decision process the evoked set size would be limited to four plus or minus two destinations. The evoked sets of 706 respondents were within this range. The conceptual implication was that the New Zealand short break context was not an influence on decision set size. Set size was a function of respondents' internal processes rather than the range and availability of near-home destinations. Table 6 presents the aggregated data for number of times each destination was mentioned in respondents' evoked sets. Again, the five destinations featured strongly. Rotorua was ranked highest, being listed by 463 out of 748 respondents (61.9 per cent), while two other destinations were mentioned by over half of the respondents.

(INSERT TABLE 6 ABOUT HERE)

The results for intent to visit each of the five destinations of interest are presented in Table 7. Each destination rated above the scale mid-point for this item, ranging from 4.8 for Coromandel to 4.1 for Mount Maunganui. For each destination the mean likelihood of visiting was highest from those respondents who had listed that destination as their ToMA choice. Table 8 compares the mean likelihood of visiting each of the five destinations, between those respondents who had listed that destination as ToMA choice

and the other respondents. Independent-samples t-tests indicated the mean likelihood of visiting each destination was significantly higher, at the $p<.001$ level, for that destination's ToMA group.

(INSERT TABLE 7 ABOUT HERE)

(INSERT TABLE 8 ABOUT HERE)

Respondents indicated a high level of previous visitation to all five destinations. Visitation level was highest for Rotorua (98.3 per cent), followed by Taupo (96.4 per cent), Bay of Islands and Coromandel (94.6 per cent) and Mount Maunganui (87.8 per cent). It was felt this validated the destination performance perception items due to respondents' familiarity with the five destinations. The destination performance rankings, shown in Table 9, confirmed the leadership positions held by Rotorua and Coromandel. Collectively, the two destinations achieved top rank for 16 of the 20 attributes, and in particular 10 of the 11 determinant attributes.

(INSERT TABLE 9 ABOUT HERE)

Discussion

Destination positioning studies have not been prominent in the tourism literature (Grabler 1997, Uysal, Chen and Williams 2000, Yau and Chan 1990). In this regard the paper has demonstrated the use of decision sets as a way of identifying which destinations have an affinity with each other in the context of a purchase decision. Little separated the intent to visit five 'attractive' domestic destinations when the means for the entire sample were examined. However, intent to visit each destination was significantly higher for those respondents who selected that place as ToMA choice. As the leading destination, in terms of visitor nights spent in commercial accommodation, it

was expected that Rotorua would perform strongest in the results of the ToMA, decision set and intent to visit. While this assertion was supported in terms of ToMA and decision set membership, the results for intent to visit were less clear. For the sample in general, the mean intent to visit Coromandel was marginally stronger than that for Rotorua. However, the size of the Rotorua ToMA group and their mean intent to visit could be interpreted as a superior performance to Coromandel. Certainly, for any individual business, such levels of ToMA and intent would probably be regarded as a valuable goodwill component on the balance sheet. For destinations, it may be that ToMA is a measure of competitive advantage, at least in the short term. For Rotorua, however, a key implication of the results was awareness of a growing competitive threat from Coromandel, which may be reflected in future visitation statistics.

A limitation of the study was that intent to visit was measured by a stated likelihood, and may not reflect actual visitation. As implied in the method section, Fishbein and Ajzen (1975) suggested that it is important to make such a hypothetical situation as close to being a realistic scenario as possible. In this regard, this may have been accomplished by reducing the time frame. For example, asking respondents to indicate destinations being considered for a short break within the next three months may have resulted in a closer approximation of the decision-making process. The relationship between ToMA selection and actual visitation could then be tested through a longitudinal format.

The results highlighted the emergence of short breaks as a significant holiday activity in New Zealand, as has been found in the UK (Ryan, 1983),

Europe (Fache, 1990) and the USA (Kotler, Bowen and Makens 1999, Plog 2000). Key results were presented to decision makers at the regional tourism organisation (RTO) representing each of the five destinations. Each RTO acknowledged this as the first data on short break holidays for their region, and expressed surprise and interest in the high number of short breaks indicated by respondents. It was recommended at each meeting that worthwhile promotional opportunities existed since no domestic destination was explicitly targeting this holiday segment. The first to respond was Tourism Bay of Plenty, which initiated a two-week television campaign in Auckland, during February/March 2002, promoting Mount Maunganui/Tauranga as a short break destination that provided relaxation and action. The other RTOs indicated the results had been incorporated in their marketing plans for 2002.

The results represented valuable benchmarks for the destination marketers. At the RTO meetings it was suggested these benchmarks could be used to track the effectiveness of future domestic promotional campaigns, and therefore increase accountability to stakeholders. After all, measuring performance is arguably one of the most neglected aspects of destination marketing (Heath, 1999).

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Table 1: Auckland Visitor Nights – Year ending June 2001

	Nights in commercial accommodation by Aucklanders	Total domestic nights in commercial accommodation	%
Rotorua	473,979	967,656	49%
Northland	271,600	397,600	68%
Taupo	260,260	776,610	34%
Coromandel	203,370	466,629	44%

Source: Commercial Accommodation Monitor, July 2001.

Table 2: Sample Characteristics

		N	Valid %
Gender	Male	350	45.9%
	Female	413	54.1%
	Total	763	
	Missing	0	
Age	18-25	25	3.3%
	26-34	118	15.5%
	35-49	297	38.9%
	50-64	233	30.5%
	65+	90	11.8%
	Total	763	
	Missing	0	
Household income	< $38,000	161	22.6%
	$38,000-$49,000	119	16.7%
	$49,001-$65,000	120	16.9%
	$65,001-$80,000	76	10.7%
	$80,001-$100,000	104	14.6%
	> $100,000	131	18.4%
	Total	711	
	Missing	52	
Marital status	Single	83	11.0%
	Gay single	5	0.7%
	Married/De facto	562	74.3%
	Permanent same sex partner	21	2.8%
	Separated/divorced/widowed	85	11.2%
	Total	756	
	Missing	7	
Number of dependent children	0	425	55.8%
	1-2	260	34.2%
	3+	76	10.0%
	Total	761	
	Missing	2	
Highest level of education	High school	279	36.8%
	Polytechnic	156	20.6%
	University graduate	105	13.8%
	Professional qualification	152	20.0%
	Post-graduate	67	8.8%
	Total	759	
	Missing	4	

Table 3: Attribute Importance

Attribute	Rank	N	Mean	Std
Suitable accommodation	1	753	5.99	1.19
Good value for money	2	752	5.99	1.29
A comfortable drive from home	3	755	5.50	1.42
Natural scenic beauty	4	756	5.37	1.40
Good cafes/restaurants	5	746	5.20	1.62
Good weather	6	752	5.07	1.49
Lots to see and do	7	747	4.85	1.51
Good ocean beaches	8	747	4.50	1.82
Friendly locals	9	742	4.46	1.74
Places for swimming or boating	10	741	4.34	1.92
Not too touristy	11	746	4.34	1.76
Hot pool bathing	12	721	4.15	1.77
Places for walking/tramping	13	734	4.11	1.86
Shopping	14	714	3.82	1.75
Wineries	15	704	3.79	1.93
Adventure activities	16	711	3.56	1.73
Fishing	17	662	3.23	2.11
Close to other holiday destinations	18	696	3.02	1.74
Snow sports	19	634	2.74	1.90
Maori culture experiences	20	663	2.41	1.63
Grand mean			**4.38**	**0.86**

Table 4: Exploratory Factor Analysis of Attribute Importance items

Factor	Alpha	Factor Loadings	Eigenvalue	Variance	Comm.
1. The good life/infrastructure	.69		4.47	27.9%	
Cafes/restaurants		.79			.63
Suitable accommodation		.73			.59
Shopping		.59			.55
Hot pool bathing		.56			.51
Value for money		.44			.43
2. Getting away from it all	.73		2.11	13.2%	
Natural scenic beauty		.75			.62
Not too touristy		.71			.52
Ocean beaches		.64			.61
Walking/tramping		.63			.46
Friendly locals		.43			.44
3. Outdoor play	.66		1.17	7.3%	
Places for swimming or boating		.72			.68
Fishing		.67			.58
Adventure activities		.58			.49
4. Kiwi weather	.64		1.09	6.8%	
Good weather		.75			.63
Lots to see/do		.65			.53
Close to other destinations		.64			.60
Total Variance				55.2%	

Table 5: Unaided ToMA Destination

Destination	Number of Respondents	Valid %
Rotorua	180	24.1
Coromandel	108	14.5
Taupo	98	13.1
Bay of Islands	97	13.0
Other Northland destinations	73	9.8
Mt Maunganui/Tauranga/Papamoa	62	8.3
Ruapehu	25	3.4
Waikato	22	2.9
Hawkes Bay	17	2.3
Gulf islands/other Auckland	16	2.1
Other Bay of Plenty	12	1.6
Wellington	11	1.5
Other	25	3.3
Total	746	100.0
Missing	17	

Table 6: Composition of Evoked Decision Sets

Destination	Total Mentions	Valid %
Rotorua	463	61.9%
Coromandel	438	58.6%
Bay of Islands	394	52.7%
Taupo	363	48.5%
Other Northland	317	42.4%
Mount Maunganui/Tauranga/Papamoa	257	34.4%
Waikato	140	18.7%
Hawkes Bay	99	12.2%
Ruapehu	90	12.0%
Other Bay of Plenty	72	9.6%
Gulf Islands/Auckland	57	7.6%
Wellington	54	7.2%
Taranaki	50	6.7%
Eastland	25	3.3%
Palmerston North	15	2.0%
Other	42	5.6%

Table 7: Likelihood of Visiting each Destination

	Rank	N	Mean	Std
Coromandel	1	759	4.8	1.4
Rotorua	2	759	4.7	1.4
Bay of Islands	3	760	4.5	1.4
Taupo	4	755	4.4	1.4
Mt Maunganui	5	751	4.1	1.4

Table 8: Likelihood of Visiting by each destination's ToMA Group

	ToMA Group n	ToMA Group mean intent to visit	Other respondents n	Others mean intent to visit	T	Sig.
Rotorua	177	5.6	580	4.4	10.024	.000
Coromandel	107	5.7	652	4.7	7.353	.000
Taupo	98	5.5	657	4.3	8.718	.000
Bay of Islands	97	5.5	663	4.4	7.546	.000
Mt Maunganui	62	5.2	689	4.0	6.891	.000

Table 9: Destination Performance Ranking by Attribute

Attribute	Importance Mean	Bay of Islands	Coromandel	Mount Maunganui	Rotorua	Taupo
Suitable accommodation	5.99	3rd	5th	4th	1st	2nd
Good value for money	5.99	4	2	5	1	3
Within a comfortable drive	5.50	4	1	3	2	5
Natural scenic beauty	5.37	2	1	5	4	3
Good cafes/restaurants	5.20	4	5	3	1	2
Good weather	5.07	2	3	1	5	4
Lots to see & do	4.85	2	3	5	1	4
Ocean beaches	4.50	3	1	2	5	4
Friendly locals	4.46	3	1	5	4	2
Places for swimming or boating	4.34	2	1	3	5	4
Not too touristy	4.34	2	1	3	5	4
Hot pool bathing	4.15	5	4	3	1	2
Places for walking/tramping	4.11	4	1	5	2	3
Shopping	3.82	4	5	1	2	3
Wineries	3.79	3	2	1	5	4
Adventure activities	3.56	3	4	5	1	2
Fishing	3.23	2	1	4	5	3
Close to another holiday destination	3.02	4	5	3	1	2
Snow sports	2.74	5	4	3	2	1
Maori culture experiences	2.41	2	5	4	1	3